

**WELLFLEET TAXATION AID FUND  
FOR  
ELDERLY AND DISABLED HOMEOWNERS**



**GUIDELINES AND APPLICATION  
FISCAL YEAR 2017**

**Application for the Fall tax bill must be submitted by  
Friday, June 17, 2016 by 4:00 p.m.**

**Return by mail or in person to:**

**Town Treasurer, Wellfleet Town Hall  
300 Main Street, Wellfleet MA 02667**

**Town Treasurer Phone: 508-349-0346  
Office Hours: Monday-Friday, 8:00am-4:00pm**

*All information supplied to the Committee will be held in the  
strictest of confidence and is not open for public inspection.*

*Application revised April 22, 2016*

**WELLFLEET TAXATION AID FUND FOR ELDERLY AND DISABLED  
FISCAL YEAR 2017**

**APPLICATION GUIDELINES**

**PURPOSE:** This fund was established to provide taxation assistance for eligible elderly and/or disabled residents of Wellfleet with their real estate tax payments. The fund was authorized by vote of Annual Town Meeting, April 22, 2013, Article 9 (acceptance of Massachusetts General Law Chapter 60, Section 3D), with volunteer contributions from Wellfleet citizens.

**ELIGIBILITY CRITERIA** for assistance from this fund are as follows:

- **OCCUPANCY:** Applicant must own and occupy the real estate in Wellfleet as his or her domicile, and must be either:
  - 1) the titled owner listed on the current property deed
  - OR 2) the primary beneficiary listed on a life estate trust of the property
  - OR 3) the primary trustee listed on a real estate trust.

**“Domicile”** is defined as the Applicant must live at this address in Wellfleet for at least 6 months, and hold title to the taxed property for a full year.

- **CRITERIA:** Applicant must be elderly or disabled.

**“Elderly”** is defined as a homeowner who is at least 55 years of age on or before **January 1** in the fiscal year for which aid is being requested.

**“Disabled”** is defined as a homeowner who is not able to work due to illness or accident and is currently receiving benefits from one or more of the following programs based on a determination of disability:

Social Security Administration, SSI or Medicaid, Veterans Administration, Workers Compensation, Wellfleet Board of Assessors, or any other such program or agency providing public/financial assistance due to the disability, or other documentation of a comparable disability satisfactory to the Committee.

- **GROSS INCOME:** Total yearly gross income of Applicant(s), *including Social Security*, must be less than \$40,000 if single, or less than \$55,000 if married.

## WELLFLEET TAXATION AID FUND FOR ELDERLY AND DISABLED FISCAL YEAR 2017

### APPLICATION PROCESS

- **APPLICATION FORMS** will be available at the Wellfleet Public Library, Council on Aging, Town Hall and on the Town of Wellfleet website: [www.wellfleet-ma.gov](http://www.wellfleet-ma.gov)
- **DEADLINE:** Applications must be delivered or postmarked no later than:  
**June 17, 2016 by 4:00 PM** and must be accompanied by all supporting documents.
- **OTHER TAX EXEMPTIONS:** We suggest you first avail yourself of the exemptions offered by the Wellfleet Board of Assessors which include exemptions for: Elderly / Widowed Spouse / Disabled Veteran / Blind / Discretionary Hardship / Tax Deferral For qualifying information, contact the Board of Assessors. Under no circumstances will the total exemptions combined with taxation aid exceed the total amount of your current tax bill.
- **TAX DEFERRAL:** A homeowner is **NOT** eligible for the Wellfleet Taxation Aid Fund if in a Clause 41A Wellfleet Property Tax Deferral.
- **PRIVACY:** All information supplied to the Committee will be held in the strictest of confidence and not be open for public inspection.
- **ADDITIONAL CIRCUMSTANCES:** In reviewing eligible applications, consideration will also be given to an applicant's overall financial situation as determined by value of other assets and personal property, living expenses, and unusual financial hardship.
- **RETURN WITH COPIES OF THE FOLLOWING SUPPORTING DOCUMENTS:**
  - \_\_\_ Completed Application Form (assistance is available through the Council on Aging)
  - \_\_\_ Current Driver's License (or) Photo ID
  - \_\_\_ Wellfleet Real Estate Tax and Personal Property Tax bills (most recent)
  - \_\_\_ Federal Income Tax Return, include all pages (most recent)
  - \_\_\_ Cover page of Property Deed (or) Life Estate Trust (or) Real Estate Trust (current)
  - \_\_\_ Disability Benefits documentation (if disabled)
- **MAIL OR DELIVER TO:**  
Town Treasurer, Wellfleet Town Hall, 300 Main Street, Wellfleet, MA 02667

### DISTRIBUTION OF FUNDS

- **FALL:** If taxation aid assistance is awarded in the fall, the applicant will be notified by mail, and the amount will be **applied to the first half of the Fiscal Year 2017 tax bill, which will be mailed in the fall of 2016.**
- **SPRING:** If taxation aid assistance is awarded in the spring, **the amount will be applied to the second half of the Fiscal Year 2017 tax bill.**